

**AUTOMATED SERVICES COMMITTEE
MINUTES
January 15, 2002**

PRESENT (voting): Ginny LaJuene (ALTM); Jeffrey Cannell (APLM); Nancy Pieri (BETH); Joe Makowiec (BRUN); Richard Naylor (COLN); Patricia Nonamaker (EGRN); Barbara Nichols-Randall (GUIL); Karen Nuckolls (UHLS); Gail Sacco (VOOR)

(Non-voting): Rawdon Cheng; John Cirrin; Sara Dallas; Jonathan Koppel; Peter Kowalski; Marcia Middleton

9:05 a.m. – Meeting was called to order by Philip Ritter, Chair.

I. Minutes

Minutes of the November 27, 2001, meeting were accepted as written.

II. Automation Services Report

K. Nuckolls introduced P. Kowalski, the UHLS Web Specialist and G. LaJuene, the new Director at the Altamont Public Library.

K. Nuckolls highlighted the following items in her written report:

- in December, over 56,000 bib. records for missing items at APLM were deleted from the database
- the COLN CAPS records that still need to be cleaned in the database are down from 30,000 to approximately 960
- several *epixtech* manuals and binders have been delivered (cataloging, serials, circulation, iPAC, StaffPac, reference tools)
- UHLS has made it clear to *epixtech* that we want to come up on Release 7.3 because it has an overdue capability that is desirable
- K. Nuckolls will be meeting with the libraries singly or in small groups to discuss the policy files
- several notices have been sent to the libraries requesting a listing of their serials. K. Nuckolls will follow up with an email listing the libraries that have sent in information.

G. Sacco asked about the status of merging records and about the way in which the Syndetics software will handle the same titles in different media: will there be a graphic for each title?

III. Implementation Team Report

R. Naylor distributed a Gantt Chart illustrating the various steps in the implementation process. G. Sacco asked if he could include another color on the chart showing the preparatory steps for the libraries. P. Ritter noted that the chart is a guide and that the schedule is flexible in order to allow time to take care of any problems as they arise rather than rush into the implementation. He stressed that he wanted everyone to be as prepared as possible.

There is an announcement regarding UHLS' purchase of the new system on the website at: epixtech.com.

Discussion regarding customizing OPACs. M. Middleton cautioned that sometimes full customization doesn't carry over from one release to the next in various software packages.

K. Nuckolls noted that, on R. Naylor's Gantt chart, the GAP load is the catchup tape load that is done right before going live. URSA is the connection that allows UHLS to be included in CDLC's online CaDiLac database.

P. Ritter noted that UHLS has purchased one full year of training that will start following the GoLive date.

G. Sacco asked if UHLS will be trained on SQL? K. Nuckolls responded that several staff members will receive that training.

P. Ritter noted that the libraries should have their computers in place and ready to go by the end of August.

IV. UHLAN fee structure

P. Ritter distributed the final chart showing the actual UHLAN fees to be paid in 2003 and the estimated fees for 2004 and 2005. The chart will be sent to the member libraries by the end of the week (January 18th).

V. Group purchases of computers

R. Cheng has received responses from seven libraries that are interested in obtaining a group discount on computers. R.Cheng will contact those libraries and determine their equipment specifications. He noted that under State contract, there is very little discount on quantity purchases. He will negotiate a price with the vendors and the libraries can then purchase directly from the vendor - this is more desirable for warranty purposes.

There is some difficulty in that some libraries are required to purchase from local vendors.

Consensus that K. Nuckolls will organize a separate "tech" meeting to discuss PC and telecomm needs.

VI. Other Business

M. Middleton has been gathering information from different telecommunications vendors as part of the Implementation Team and will report at a later meeting.

Discussion regarding the type of reports available from the automation system that can be used in doing an inventory of collections. R. Naylor noted the COLN recently purchased a year-end report from UHLS that he can put into FileMaker Pro and can manipulate the data for a variety of purposes.

R. Cheng reported that sometime in February, UHLS will be moving its internet access to RoadRunner. Our current access is through ICI via CDLC but CDLC is moving to AT&T. He noted that RoadRunner access is faster than AT&T. There were discussions with CDLC about using our respective systems as back-ups for

each other but CDLC preferred not to cooperate. R. Cheng noted that a backup internet provider is very important in order to maintain contact, however, the backup will not be as fast as the primary. UHLS has been experimenting with RoadRunner over the past year and has been satisfied with their performance. Libraries interested in switching to RoadRunner need to call the company and they will come and install a cable modem. The libraries who have been participating in the RoadRunner experiment will now begin paying for RoadRunner service.

P. Nonamaker asked if there would be a backup service in place when the change is made to RoadRunner? R. Cheng replied that there would not be a backup provider by that time.

Discussion regarding viruses and email. R. Naylor noted that the Nimda virus got into the COLN computers several weeks ago. The Town of Colonie sends its email through a service that “cleans” it before it reaches the Town computers. This service costs about \$50 per month. R. Cheng will contact the Town and investigate the possibility of this service for UHLS and report at the February ASC meeting.

Even with a “cleaning” service, it is still important to continue virus protection on individual PCs.

R. Cheng is also looking into two email packages with virus protection included: Microsoft Exchange and I-Mail. There are approximately 300 mailboxes on the UHLS email server.

M. Middleton noted that educating staff about email and viruses is very important and that perhaps some guidelines for good email use could be developed (i.e. learning how to identify “infected” attachments, etc.)

There are still some problems with the Web2 interface. A service call has been placed with DRA. P. Ritter cautioned that DRA is not likely to be very quick on these service calls since we are moving to another system. In addition, SIRSI is phasing out DRA products. The UHLS staff will continue to pursue the service call and assistance.

10:45 AM meeting adjourned.

Next meeting: Tuesday, February 26th, 9:00 AM at UHLS

Heidi A. Fuge
1/17/02

AUTOMATION SERVICES REPORT JANUARY 15, 2002

LINKING LIBRARIES

Linkers inputting bib & item records for items sent from RENS & RVLL into UHLAN database.

Item linking continuing at CAST, RVLL, & VAFL onsite.

ANSWERED QUESTIONS FROM MEMBER LIBRARIES ON:

Username (APL; BETH; COLN; TROY)

Calendars

Linking

Patron cards & barcodes

Policy file changes (NGRN; SCHG; VOOR)

Reports

Web2 reserves

epixtech Horizon

MEETINGS ATTENDED AND LIBRARIES VISITED

11/28: Numbers Tell the Story II (Karen)

12/12: Implementation Team meeting

1/3 : Implementation Team meeting

Visits to WTVT (Jonathan & Rawdon; Peter); BRLN; COLN, NASS, PTRB (J, R & P)

INTRODUCTION OF PETER KOWALSKI

Peter Kowalski has joined the Automation Services Department as Web Specialist. His duties will consist of designing and maintaining the UHLS website and Intranet; assisting libraries with their websites; PC support; working with the new Horizon library system.

SYSTEM MIGRATION

Phil signed the UHLS contract with *epixtech* Horizon and we were assigned a Project Manager, Mark Derrick, as well as a Project Team, to assist us through the migration process.

Mountains of manuals and binders (some wrong) descended upon us. It appears that each library in the system will receive key module manuals, as *epixtech* was willing to send us 30 copies. We are still awaiting the completion of the order.

The Implementation Team met on December 12 and January 3, and discussed the Implementation Schedule. It was agreed, and it has been relayed to Mark Derrick, that UHLS will come up on Release 7.3 (and no earlier). This is because that release will support the ability to send Overdue notices from the *owning* library. Release 7.3 is scheduled for Fall 2002. More information on the exact date is forthcoming.

Therefore, training will also be pushed back into the fall, a schedule which libraries told us they preferred. This will be to our advantage, as it will result in more testing time for UHLS and member library staff on the system.

As soon as additional copies are received and the Imp Team has looked it over, member libraries will be contacted about attending meetings to fill out the Horizon Implementation Manual (which is essentially the DRA Circ Policy File). There will be several sites chosen in each county for smaller libraries to attend. Larger libraries will meet at UHLS or at their site.

epixtech 'officially' begins our migration process in February: the earliest they could fit us into their schedule.

Rawdon sent *epixtech* a bib record sample of 10,000 bib records, and followed it with a random item record sample. He is now in the process of sending a larger sample, after Karen looked over Grant Pearson's (Data Consultant) notes and answered questions on some MARC holdings tags that should be deleted (several BCCLS and LAARC tags). We may be able to delete the LAARC tags ourselves through a DRA program.

DATABASE CLEANUP

Last month, over 56,000 APL bib records for missing titles were purged from the UHLAN database. Our original estimate of over 450,000 bib records has now 'shrunk' to 400,000 items. (This will save us some migration \$\$.) We are continuing work on overlaying duplicates and eliminating other short, brief records. Thanks to all libraries for helping us with this process.

E-MAIL TRAINING

UHLS Automation Services is offering e-mail training on Outlook Express and Netscape Messenger. Please contact anyone in the department to sign up. We are placing a registration form on the Intranet.

SERIALS UNION LIST

Libraries should send Karen a listing of their periodicals (name, dates they began subscribing, issues kept [i.e., all, current year only]). We will have a tape extract from OCLC in June and it will be loaded into the Horizon system by *epixtech*, thus forming the basis for our Serials Checkin module.

Library	Fiscal Year 2000	# of Items owned	% of Total Items	Item Fee 2003	Item Fee 2004	Item Fee 2005	Last 12 Months Circ	% of Last 12 Months Circ	Circ Fee 2003	Circ Fee 2004	Circ Fee 2005	Uhlan Access Fee	Total 2003	Total 2004	Total 2005
APLM	\$21,560	201,651	17.14%	\$5,496	\$6,353	\$7,211	681,283	21.78%	\$20,944	\$24,210	\$27,476	\$880	\$27,320	\$31,443	\$35,567
ALTM	\$1,320	12,914	1.10%	\$352	\$407	\$462	25,333	0.81%	\$779	\$900	\$1,022	\$880	\$2,011	\$2,187	\$2,363
BRLN	\$1,320	9,090	0.77%	\$248	\$286	\$325	14,374	0.46%	\$442	\$511	\$580	\$880	\$1,570	\$1,677	\$1,785
BERN	\$880	11,853	1.01%	\$323	\$373	\$424	7,359	0.24%	\$226	\$262	\$297	\$880	\$1,429	\$1,515	\$1,601
BETH	\$14,520	142,806	12.14%	\$3,892	\$4,499	\$5,106	553,854	17.70%	\$17,026	\$19,682	\$22,337	\$880	\$21,799	\$25,061	\$28,323
BRUN	\$1,320	12,665	1.08%	\$345	\$399	\$453	33,164	1.06%	\$1,020	\$1,179	\$1,338	\$880	\$2,245	\$2,458	\$2,670
CAST	\$0	11,516	0.98%	\$314	\$363	\$412	625	0.02%	\$19	\$22	\$25	\$880	\$1,213	\$1,265	\$1,317
COHS	\$2,200	28,370	2.41%	\$773	\$894	\$1,014	45,173	1.44%	\$1,389	\$1,605	\$1,822	\$880	\$3,042	\$3,379	\$3,716
EGRN	\$17,600	53,832	4.58%	\$1,467	\$1,696	\$1,925	216,358	6.92%	\$6,651	\$7,688	\$8,726	\$880	\$8,998	\$10,265	\$11,531
GRAF	\$2,200	9,954	0.85%	\$271	\$314	\$356	17,219	0.55%	\$529	\$612	\$694	\$880	\$1,681	\$1,806	\$1,930
GUIL	\$18,040	148,835	12.65%	\$4,057	\$4,689	\$5,322	442,177	14.13%	\$13,593	\$15,713	\$17,833	\$880	\$18,530	\$21,282	\$24,035
HOOF	\$880	15,585	1.32%	\$425	\$491	\$557	25,417	0.81%	\$781	\$903	\$1,025	\$880	\$2,086	\$2,274	\$2,462
MEND	\$880	8,938	0.76%	\$244	\$282	\$320	18,115	0.58%	\$557	\$644	\$731	\$880	\$1,680	\$1,805	\$1,930
NASS	\$1,320	16,182	1.38%	\$441	\$510	\$579	19,701	0.63%	\$606	\$700	\$795	\$880	\$1,927	\$2,090	\$2,253
NGRN	\$1,760	47,267	4.02%	\$1,288	\$1,489	\$1,690	73,261	2.34%	\$2,252	\$2,603	\$2,955	\$880	\$4,420	\$4,973	\$5,525
PTRB	\$2,200	15,492	1.32%	\$422	\$488	\$554	29,857	0.95%	\$918	\$1,061	\$1,204	\$880	\$2,220	\$2,429	\$2,638
POES	\$1,320	14,623	1.24%	\$399	\$461	\$523	24,750	0.79%	\$761	\$880	\$998	\$880	\$2,039	\$2,220	\$2,401
RCSC	\$1,760	19,976	1.70%	\$544	\$629	\$714	33,919	1.08%	\$1,043	\$1,205	\$1,368	\$880	\$2,467	\$2,715	\$2,962
RENS	\$0	1,959	0.17%	\$53	\$62	\$70	14	0.00%	\$0	\$0	\$1	\$880	\$934	\$942	\$951
RVLL	\$0	339	0.03%	\$9	\$11	\$12	1,938	0.06%	\$60	\$69	\$78	\$880	\$949	\$960	\$970
SNLK	\$2,200	24,228	2.06%	\$660	\$763	\$866	46,386	1.48%	\$1,426	\$1,648	\$1,871	\$880	\$2,966	\$3,292	\$3,617
SCHG	\$0	4,984	0.42%	\$136	\$157	\$178	2,029	0.06%	\$62	\$72	\$82	\$880	\$1,078	\$1,109	\$1,140
STEP	\$880	7,915	0.67%	\$216	\$249	\$283	16,281	0.52%	\$501	\$579	\$657	\$880	\$1,596	\$1,708	\$1,820
TROY	\$6,600	99,676	8.47%	\$2,717	\$3,140	\$3,564	114,333	3.65%	\$3,515	\$4,063	\$4,611	\$880	\$7,112	\$8,083	\$9,055
VAFL	\$0	5,864	0.50%	\$160	\$185	\$210	468	0.01%	\$14	\$17	\$19	\$880	\$1,054	\$1,081	\$1,109
VOOR	\$7,480	46,608	3.96%	\$1,270	\$1,468	\$1,667	109,680	3.51%	\$3,372	\$3,898	\$4,423	\$880	\$5,522	\$6,246	\$6,970
WTVT	\$1,760	16,865	1.43%	\$460	\$531	\$603	12,717	0.41%	\$391	\$452	\$513	\$880	\$1,731	\$1,863	\$1,996
WSTR	\$1,760	11,792	1.00%	\$321	\$372	\$422	16,906	0.54%	\$520	\$601	\$682	\$880	\$1,721	\$1,852	\$1,983
COLN	\$22,000	174,472	14.83%	\$4,755	\$5,497	\$6,239	545,982	17.45%	\$16,784	\$19,402	\$22,020	\$880	\$22,420	\$25,779	\$29,138
Total	\$133,760	1,176,251	100%	\$32,060	\$37,060	\$42,060	3,128,673	100%	\$96,180	\$111,180	\$126,180	\$25,520	\$153,760	\$173,760	\$193,760

Items = 25%, Circ = 75%

Item Fee + Circ Fee + UHLAN Access Fee = Total

1/17/2002

Actual UHLAN Charges for 2003 Based on 2001 Calendar Year Figures - Estimated Charges for 2004 and 2005

Approved by the UHLS Board of Trustees 11-14-01